



Commodities and Products

U.S. Seafood Exports Continue Upward Trend in the Dynamic EU Market

By Joel Chetrick

During the first half of calendar 2005, U.S. seafood exports to the EU (European Union) continued to grow impressively, with sales increasing for a variety of products, including high-value seafood, such as lobster and scallops, and intermediate-value products used mainly for further processing, such as pollock, cod, surimi and mackerel. Overall, U.S. seafood exports to the EU during January-June amounted to 111,964 metric tons (up 5.4 percent from the same period in 2004) and were valued at \$363.5 million (up 14.6 percent).

Pollock and lobster were the leading exports, valued at \$56.9 million and \$55.6 million, respectively. Other large exports included cod (\$48.8 million), canned salmon (\$39.5 million), surimi (\$28.6 million), scallops (\$26.9 million),

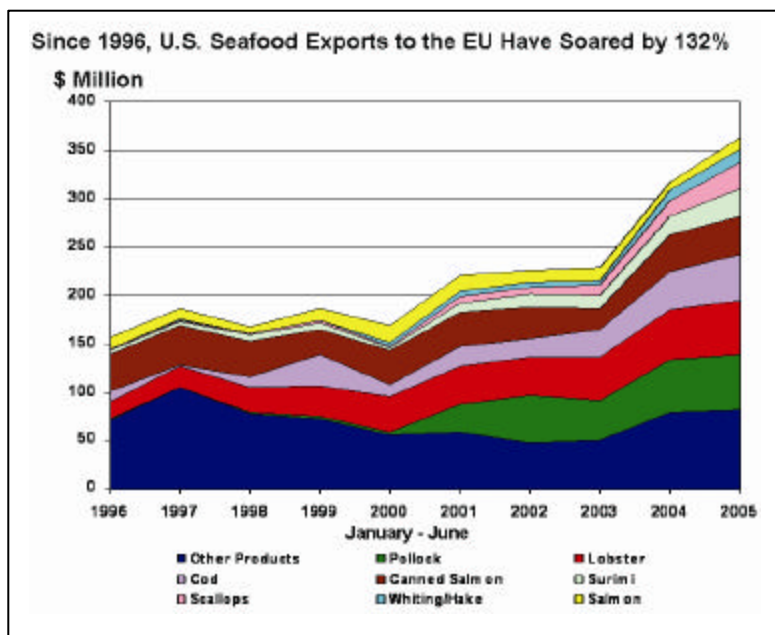
whiting/hake (\$13.9 million) and salmon (including fresh, frozen and roe, at \$11.8 million). These eight products accounted for 78 percent of the value of U.S. seafood exports to the EU.

In recent years, there has been significant growth in the overall value of U.S. seafood exports to the region. Value gains have been especially strong for pollock, lobster, cod, surimi and scallops, as shown in the chart.

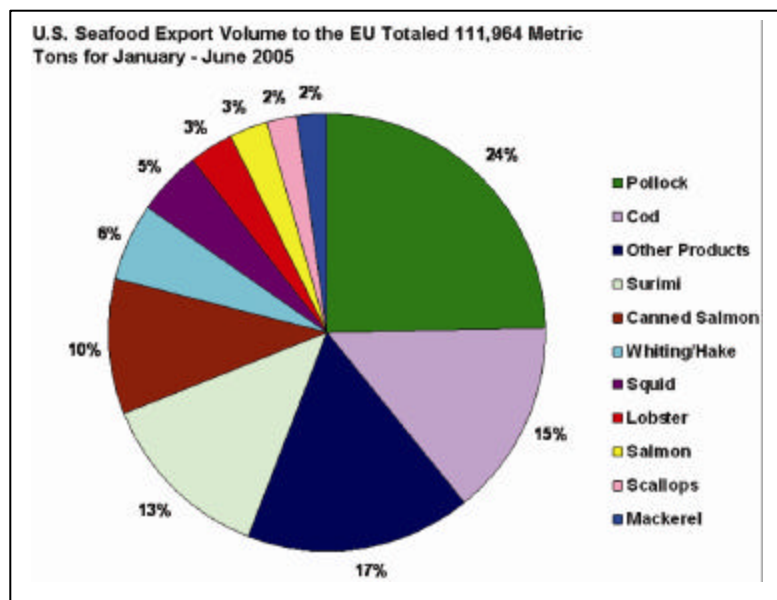
The top 10 products in export volume—pollock, cod, surimi, canned salmon, whiting/hake, squid, lobster, salmon, scallops and mackerel—comprised 83 percent of U.S. seafood exported to the region during January-June 2005.

The top 10 EU destinations in terms of volume were Germany (comprising 27.4 percent of the EU total volume), the Netherlands (comprising 18.8 percent, with most product re-exported in the EU), the United Kingdom (11.0 percent), France (9.7 percent), Spain (8.4 percent), Portugal (8.1 percent), Lithuania (6.3 percent, with most product further processed and re-exported), Italy (4.4 percent), Belgium (1.2 percent) and Greece (1.1 percent). These 10 markets accounted for 96.4 percent of the volume and 96.6 percent of the value of U.S. seafood exported to the EU during the six-month period.

Several factors have played a role in the growing U.S. exports to the EU, including seafood's popularity due to



interest in healthy eating and the great variety of surimi-based convenience foods sold in the retail sector. In France, for example, artificial crabsticks and other items that feature Alaska pollock surimi are especially popular in cold salads and as snacks.



Another important factor has been the improved quality of U.S. seafood, as evidenced by the availability of large sea scallops and Atlantic mackerel with high fat content. Also, marketing seafood from well-managed fisheries, such as Pacific cod, Alaska pollock and salmon, is important to EU seafood processors. Constraints on domestic whitefish supplies have increased EU processors' reliance on imported whitefish (including Alaska pollock, Pacific cod and whiting/hake). Moreover, the strength of the euro relative to the dollar has helped make U.S. seafood very price competitive.

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